

**PILOT LOCAL GOVERNMENT
PARTNERSHIP PROGRAM**

**INFORMATION AND
COMMUNICATION PROGRAM
FOR TWO ENTERPRISES IN
PARTNER CITY BIELSKO BIALA**

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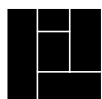
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INTRODUCTION

Bielsko Biala has undergone a lengthy process of preparing two departments—the MZK bus transportation company and ZOM, the city cleaning and waste disposal company—for transformation to joint stock company status (“SA” designation). In order to gain the support of the Gmina Council to act upon the Deputy Mayor's request for transforming these two departments and committing to the very substantial financial investments that will be necessary to sustain the first several years of ZOMSA operations, and indefinitely for MZKSA, as semi-independent enterprises, a very comprehensive information dissemination program has been developed for stakeholders, as described below.

This program seeks to overcome what are anticipated as major concerns facing the decision makers of any Polish city wishing to consider joint stock company status for any of its departments. Some of those concerns will be truly substantial, and others will be minor in substance but great in political impact if there are insufficient answers to be found and disseminated effectively and on a timely basis. Resistance to change is a given in any city, and generally the opponents of change will capitalize upon any instance of uninformed leadership as all parties try to work with a complex set of restructuring issues.

Moreover, the fledgling joint stock companies may face resistance from various stakeholder groups, if, after surviving a Gmina Council approval vote, the new entities present a poor public image in terms of having a clear mission within the city service provision community. Employee unions, citizen interest groups, political parties, ecological organizations, and the customer population may lend only lukewarm support, or even overtly oppose, increased management independence for the joint stock companies. In the long run such opposition may cause the JSCs to fail altogether, or in the short run to fail to receive financial support from the Gmina Council.

General concerns that an effective communications program must deal with effectively include:

- For the Gmina Council:
 - A public perception of loss of Council control of the budget process and oversight of operations.
 - A perceived and a real decrease in the importance of the Council as a guardian of the public interest because of its once-removed role in overseeing two vital operating departments.
 - A loss of political capital because Councilors will no longer be able to take credit for two well run and highly visible departments.
- For the employees:

- A fear of layoffs and the possibility of more work for the same number of employees as the enterprises grow in scope, equipment, etc.
- a fear of changes in working conditions by a newly empowered enterprise manager, the most feared change being an increase in work hours.
- For the customers of the enterprises:
 - A concern that services will be arbitrarily reduced without the direct oversight of the Council.
 - A concern that the fees for services will lose city support (subsidies) and rise too rapidly.

This report is prepared as a part of company action program, but some aspects of work to be done by the City Executive Board and Municipal Office are also raised. The main constraint for the report is that the two companies have not yet prepared and implemented a development program in coordination with the city development plan, based on local sectoral policy. So the report shows only a set of aspects to be included in a communication and information program, but sectoral programming should be prepared before launching a wider reform process.

The January workshop concerning these restructurings included discussions on having the two enterprises brought more into the overall planning and development processes of the city, in that growth policies and land use decision made by the city government will greatly affect the size and makeup of the future joint stock companies, and conversely, the ability of the two enterprises to adapt to service demands will have an effect on the city's ability to attract new industry and residents.

MAIN PARTIES TO THE PROCESS

The City

According to the Polish Local Government Act two administrative and political bodies are involved in the process of company restructuring:

- The city executive board is responsible for negotiations and the preparation of draft documents (contracts, transferring properties into assets or other forms of giving them over for into company disposition).
- The city council decides on the type of company(ies) to be formed, and has control over how city properties are to be owned (by the council or by the JSCs).
- The executive board signs legal documents (contracts, licenses, leasing/ renting), and then oversees the implementation process.

The main role of the city is to prepare and take decisions and also provide political support for the whole process by:

- Taking all political and administrative decisions by both bodies—city council and executive board.
- Giving full explanations to all potentially involved parties on new legal and economic proposals.
- Preparing legal documents.
- Providing coherent and full information to the general public.
- offering incentives and guarantees on city benefit policies for management and employees.

Top Management of the Joint Stock Companies

In other cities where restructurings have taken place, JSC boards have had to decide on the appointment process for the JSC directors, whether to retain the previous directors or to hire new ones based on a competitive process. This is a management decision for the new boards, and the single most important one facing them. The reason that this issue is mentioned in this report on communications is that the competitive process, if that is the chosen route, should be discussed fully prior to the full implementation of the restructuring(s), and the qualifications for the positions and the selection process should be made known to the city in general. While the JSC boards will not have been constituted prior to the restructurings, the city as controlling or sole stock holder should deal with the criteria for the management selection issue fully and in open session.

In other jurisdictions top managers are sometimes engaged at a high level of pay and held to rigorous standards of performance. Tenure is based strictly on performance in those instances, and the turnover level can be high.

Whatever managers are chosen or retained, they should assume leadership of the communications programs for their respective JSCs, and they should be given training in effective live presentation specifically to disseminate information on the following key JSC issues:

- The JSC business plan, including capital investment levels, methods for trending revenue needs and resultant fee levels, and the levels of service to be provided under optimum financial conditions.
- The role which the JSC plays in the city's overall plans for transportation improvements and solid waste management, in order to have an impact on those planning decisions.
- The benefits to be realized by the general public and by the employees of each JSC.
- The “vision” of the JSC, both in terms of a new customer orientation and an entrepreneurial approach which will solidify the image of the JSCs as being freed from traditional constraints and able to expand and improve with no major negative effects on the clients, the employees, or the city in general.

Unions and Employee Organizations

Both JSCs will have unions representing the employees, with formally adopted labor contracts (ZOM now has only an unwritten “gentlemen's agreement” with the city). Also, as part owners of each JSC, employees will by law form associations with significant powers.

The management of the JSCs will therefore need to carry on a dialogue with the employees and their representatives not only episodically, as employment agreements come up for negotiation, but continuously, as employees enjoy a heightened ability to influence policy making, and as partial owners, the bottom line.

Managers of the JSCs should consider the employee representatives as resources to aid in their efforts to expand services and possibly service areas. Yet in order to bring in the representatives and to benefit from their active cooperation in expanding the scope and nature of the JSCS, the managers will need to convince them that the new status of the enterprises offers opportunities that far outweigh the perceived disadvantages, such as the perceived threat of layoffs due to new efficiency mandates.

Management will need to be creative as to the offering of new salary and fringe benefits in order to form a solid dialogue with employee groups, and will need an effective communications device to forestall harmful rumors about impending changes in working conditions, layoffs, etc.

Local Media

In Bielsko Biala there are two local radio stations, two newspapers (as supplements to national papers), and also there two a regional TV stations (public and private). This seems to be adequate for possible news dissemination, provided that the restructurings and the resultant changes in service levels get the attention of the reporters and editors. Under the new press freedom in Poland there will be less opportunity to manage the press and more of a need to vie for coverage as world news and feature stories about non-governmental issues begin to take up more space every day.

Both JSCs will have public relations staff to form working relationships with local reporters. Those PR staff will be required to come up with innovative methods, such as timely press releases, human interest stories related to their enterprises, and information about new services being offered or contemplated, in order to reach the public through media no longer solely owned by the government.

MEASURES OF INFORMATION AND COMMUNICATION

Official Statements

From an administrative point of view the beginning of all transformation processes is the issuance of official statements announcing or clarifying acts of law. While easily understood by public officials with experience in drafting and lobbying for statutes and ministry decrees, these descriptions of changes in legal status and/or operating procedures will need to be interpreted for general consumption (as are job descriptions for new positions to be funded, for example).

Such decisions and descriptions should be issued by the appropriate city authorities, but in most instances not before they have been vetted by the public relations officers of the JSCs, and in some cases by the employee representatives.

In that new laws and regulations affecting the employees of the JSCs, on the one hand, and the consumers of services, on the other, take considerable time to be debated and enacted and put into effect, the enterprise managers will usually have ample time to prepare news releases or internal memos about the changes about to take effect, to include at least the following descriptive elements:

- The goals of the new law or regulation, whether imposed by the national government or sought by the local authorities.
- The challenges in administering the new law, and the effects to be felt by the consumers, if any.
- The financial costs and other constraints that are likely to affect consumers or employees, or the city budget as a whole.

Officials should be mindful that the public has little interest in the details of municipal administration, and so the laws being explained should be only those that will have a direct effect on the consumers of the service(s), or on the city's financial condition. Other items of interest to the managers of the city or the JSCs

should be reviewed for public appeal, and the top administrators should limit the number of release of information in order to avoid lulling the population with too much information of marginal or no interest to them.

Press Releases

This is one of most effective and acceptable tools for information dissemination and communication under current Polish conditions. The press officer should be “on line” with the major media, and when possible should prepare well in advance written materials (to ease the journalists' work). As most journalists now working for local papers and television are young people, the press officer should also be young, polite, helpful, and friendly. His or her scope of work should be prepared and supervised by professionals, and he or she should be given some editorial license as to the types of releases made and the clientele bases created and nurtured.

Customer Surveys

In Bielsko Biala no detailed customer surveys have been carried out. ZOM has done a short questionnaire on customer satisfaction with trash collection. And MZK has made some efforts to collect information on passenger usage and satisfaction with service.

To ascertain the most important target areas for customer needs, detailed surveys should be undertaken. In particular:

- Projected waste volumes and types, in view of recycling potentials.
- Trip behavior patterns for bus riders, and the elasticity of riders offered alternative routing.
- Customer satisfaction with the kinds of services projected to be offered under moderate fee increase levels, no increase levels, and substantial increase levels.
- Quality of life concerns of citizens at large and their elected representatives, for example, buffer zones around the landfill, on- demand bus service for remote areas, recycling of a wide range of disposables, more elaborate bus shelters.

Public Meetings (Hearings)

There are local (for each housing unit, “osiedle”) councils, working directly with larger groups of inhabitants. These osiedle could be a basis for public meetings and hearings at the neighborhood level.

There is no tradition of routine public hearings in Poland. So, to introduce such a useful measure the city and the JSCs should start with a pilot case. Suggestions are:

- For waste management: presentation of options for a wide system of waste segregation and recycling. Using questionnaire results as a basis and a start for discussions, participants could make inputs into some of the basic decisions about collection and disposal programs, and the design of the landfill necessary to accommodate such programs.
- For public transport: in order to lower costs but keep patronage, and based on customer questionnaire results, have the public make inputs into routing alternatives.

As a minimum, these hearings and interactive sessions should be videotaped for editing and distribution, or more preferably, covered by local television, radio, and newspapers. The format should allow for non-intrusive coverage to allow for greatest spontaneity.

Presentations of New Undertakings

One of basic goals for the transformations of municipal utilities is to introduce a new system of management: more effective, more open, and more entrepreneurial. To be successful this action should be connected with important new undertakings which will bring a new quality of services. Such undertakings could be, for example:

- For ZOM:
 - New containers, including a wider waste segregation system
 - New or reconstituted vehicles for waste collection or snow plowing
 - A new tariff scheme which introduces incentives for waste recycling
- For MZK:
 - New (and possibly special purpose) buses
 - Expanded or otherwise improved bus stops
 - A new tariff system with incentives for higher mobility

Joint endeavors by the city administration and Council and the JSC management should be stressed to show that the city government has a stake in and interest in the JSCs' success above and beyond the majority vote on the boards of directors. This demonstrates an innovative intent on everyone's part.

Brochures for Clients (and General Public)

Brochures are a traditional but effective mode of disseminating information. Now in Poland it is a rather common method. Citizens approve of this graphic and inexpensive method for reaching wide audiences.

NEGOTIATIONS AND EXPLANATIONS

The section below describes some of the major areas of concern for the managers of the JSCs and the representatives of city government. Negotiations with unions and any other employee organizations are of utmost importance in building a collaborative relationship that is within legal bounds and acceptable Polish municipal practice.

The "offers" to unions are discussed in more detail in the action plan, but it is important to note here that the offers should be in the form of very firm plans for the early years of the JSC status for the enterprises. While the impression should be reinforced that all things are somewhat negotiable, it should be stressed by managers that in order for the JSCs to prosper (to the benefit of employees not the least) work force size must be controlled and managed for full effect. Providing more service per unit of cost is one of the main goals of the restructurings, and the reason for gaining more management autonomy is not to take

away restraints placed on the JSCs by the city, but to demonstrate an ability to work better with less direct control.

“Offers” to Unions and Employees

The restructuring must contain some clear and serious incentives for employees. This is a most important challenge for the city, JSC managers, and consultants. To make itself successful, a company must prepare and implement the following before starting negotiations:

- Medium- and long-term restructuring plans, including annual business plans and capital investment schemes.
- Projections for employment levels and revenues for salaries (shown clearly in a plan based upon service level assumptions and fee projections).
- Expectations about the types of efficiencies other than layoffs to be instituted.

This is not to say that the work force should be guaranteed its present makeup and size. They can, as in other cities, buy into a natural reduction scenario, with reductions in force taking place as equipment and other efficiencies are made, and as the demographics of the work force permit (attrition or buyout of workers nearing retirement age, for example).

Employees as partial owners of the JSCs will support programs to weed out the least productive workers, whatever the cause of such low productivity (low educational level, improper posting, alcoholism, etc.). Experience in other cities has shown that workers who have an interest in the company are less tolerant of job abuse, and they see attrition as way to increase the compensation of the workers who remain.

What Is the Difference Between “Budget Unit” and “Joint Stock Company”?

When restructuring started in 1990 the reasons for doing so were generally to improve operations by improving the flexibility and accountability to customers of major city departments which were perceived to have the potential for growth and less dependency on city subsidies as their fee revenues were allowed to increase over time. The companies were projected to benefit after restructuring by increases in autonomy, by transparently needing to reconcile expenses with revenues, by making more major inputs into tariff setting based on an expansive planning process, and by instituting management improvements as a result of divided ownership and the opportunity to make a “profit.”

These aspects will give both companies much better flexibility in operations. Naturally it is impossible to leave the companies without City control and supervision, but all aspects of relations between the companies and the City must be done under proper contracts. The proof of the theories about autonomy, increased effectiveness, etc. is in the proper administration of tight contracts by competent managers in the companies and in the city administration.

Client Orientation

This is one of the greatest changes in the working environment of the two companies. Now a passenger of MZK or a resident for ZOM becomes a *client*. This concept will have difficulty taking root in the Polish society, but a concentrated communication program can overcome some of the holdover command economy thinking if certain advantages of the client orientation are stressed. Among those are:

- A higher quality of service attracts more clients, which stabilizes enterprise employment, creates profits, and leads to an even higher level of service.
- Income is made only as a positive difference between costs and revenues, and unit costs and profits depend on having a secure and growing client base.
- Consumers now have more choices about transportation and solid waste disposal, and they will cease to be clients of the JSCs if they see more convenient and cheaper solutions to meet their needs.
- Clients, and former clients, will vote out of office those city officials who fail to support good transportation and solid waste services.

BASIC AIMS OF THE PROGRAM

Bringing Higher Quality Public Services at Reasonable Prices to Clients, and Lower Costs to the City Budget

It must be stressed strongly that this result is a basic one and all others are subsidiary. None of the stakeholders will take the enormous political and personal risks required to make the restructurings viable if there are not very tangible financial and service benefits that will be felt quickly by the consumers of the services, and seen in the city's budget within a few years.

These gains must also be seen as a logical part of democratic and institutional improvements taking place rapidly across Poland, not as an isolated experiment with a high risk potential.

Making the Transformations as Smooth as Possible

As Polish law doesn't require the agreement of the employees (or unions) to restructure a budget unit (while it's required for a "state enterprise") such an agreement is politically necessary. This will allow management to work with less likelihood of protests or strikes.

The effort will be doomed to failure if there is not a continuity of leadership either through a timely appointment of top management or the continuation of existing managers of the two JSCs. The effort will also fail if the public and the employees see great disunity among policy makers as the first few years unfold.

Disagreements over details are expected, but unanimity over the concept of making the restructurings successful is key to the process.

Strengthening the JSCs Through Job Satisfaction

The communications program must be seen and used by management as a tool for developing an ethic among workers that their efforts contribute directly to positive or negative outcomes for the JSC. When that connection is made and reinforced, resistance to overall program effectiveness that requires some amount of sacrifice will diminish. Sacrifice will then be seen as an ingredient for success rather than a surrender to the will of the top management.

PROGRAM SCHEDULE

Of necessity the planning for the restructurings was done in a near vacuum. Several city administrators and Councilors, a dozen or so staff, and a few employee representatives played a formal role in the process. The media were given selected information through an official department of the city. Present and future customers were approached selectively, as were potential investors. Employees were briefed only on a few specifics, although it is assumed that union representatives passed on the results of their briefings by city officials.

Therefore there is no accurate way to assess the reaction about to be voiced by the public and specific interest groups, as the plan unfolds in a public setting. However, a general plan of action can be drawn up, subject to fine tuning and the inclusion of specific issue areas brought up by those who respond to the plans as they are publicized and debated.

The communications policy documents are proposed to be prepared by professionals, then discussed and approved by the City Council, and then implementation will be the responsibility of the City Executive Board (Local Government). There is no likelihood for very wide public discussion of the restructuring process because that process is now far advanced and a Council decision is imminent.

A detailed working action plan is proposed below. In the following paragraphs the acronyms are:

- LG - Local Government (The City Executive Board)
- CC - The City Council
- CM - Joint Stock Company Management
- Un - Unions

Local Government and Citizen Relationships

- Presentation to the public of transport or waste management policy and the role of public utilities (done by LG).

- Establishing and presentation of a general tariff policy for a minimum of 5 years (CC). These are to be derived from financial models produced by the team, and are assumptions about rates of fee increases necessary for continued improvements to service and equipment.
- Announcement of vehicle and other equipment renewal policy and program (LG)

Company and Client Relationships

- Incorporation of ZOMSA ongoing information on zoning, lines, timetables, tariffs (CM)
- Advertisement of services (CM)
- Training of staff on client/company relationships (CM, Un)
- Investment information on rolling stock, cleanliness, safety (CM)

Local Government and Company Relations

- Declaration of LG on urban transport policy and public transport priority (LG)
- Declaration of LG on waste management policy (LG)
- Announcements on revenue/costs agreements and contracts (LG, CM)



- Results on subsidy policy negotiations (CC, LG, CM)
- Clear reward/penalty agreements (LG, CM)

Management and Employees (Unions) Relationships

- Salaries negotiations and quarantines (CM, Un)
- Employment quarantines (CM, Un)
- Equipment improvements (CM)
- Other social benefits (CM)
- Efficiency declarations (Un)

ANNEX A

TABLE OF ACTION PROGRAM AND TIME SEQUENCE

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TABLE OF ACTION PROGRAM AND TIME SEQUENCE

This table shows possible staging and task orientation for the three main actors of the reform program: the Mayor's Office, Management of the two companies, and unions. Due to the importance of this component of the restructurings, and due to the novelty of some of the tools to be used (design charettes, financial statements as sales techniques, etc.), it is critical that the mayor's office assign someone in a position of authority to carry on monitoring activities for the duration of the program. A report should be produced by the city at the end of the program's main components in order to aid other Local Government Partnership Program cities contemplating similar efforts.

Who	For Whom	What	Lead	Time Sequence (month)
Local Government	General public	Series of <i>public presentations and meetings</i> with the City and media:	The Mayor's office	1
		<ul style="list-style-type: none"> • Presentation of local (and regional, state) policy on transport and waste • Stressing new challenges for 		

**Table of Action Program and Time Sequence
(Continued)**

Who	For Whom	What	Lead	Time Sequence (month)
Local Government	ZOM	<p>Establishing the <i>waste management policy</i> as a part of an urban ecological and economic policy (a <i>document</i>, agreed by the City Council, presented to ZOM), including:</p> <ul style="list-style-type: none"> • Landfill operations policy (given contract or bid) • License competition - present and future policies • Ecological fund policy <p>This document is disseminated to company management and presented to employees.</p>	Local government	3
Local Government	MZK	<p>Establishing the <i>public transport policy</i> as a part of an urban transport system (a <i>document</i>, agreed to by the City Council and presented to MZK), including:</p>	Council's appointee for master planning	6

Model split target

**Table of Action Program and Time Sequence
(Continued)**

Who	For Whom	What	Lead	Time Sequence (month)
<i>Stage II: Company and Client - Initial Phase</i>				
ZOM	Property owners	<p>Written <i>program</i> for company reforms, including:</p> <ul style="list-style-type: none"> • New containers, with waste segregation options, • Rolling stock policy (reconstruction of existing fleet, some new purchases) • New service products, like special offers, hazardous waste collection • Landfill operations offer (working hours, on-site services, billing practices, remediation and landscaping issues) 	ZOM management	3

This document is disseminated to the public as a booklet with existing services (e.g. bills) and via media.

**Table of Action Program and Time Sequence
(Continued)**

Who	For Whom	What	Lead	Time Sequence (month)
<i>Stage III: Local Government and Companies (ZOM, MZK) - Initial Phase</i>				
Local Government	Management of companies	<p>Written <i>agreement</i> on company reforms procedures and guarantees, including:</p> <ul style="list-style-type: none"> • Dedicated range of services • Allowed expansion of services on the company's initiative • Staff training program (to be provided by the City) • Union leaders training (to be provided by unions associations with city support) 	The Mayor's Office	2
Local Government	Management of companies	Initial future <i>contract negotiations</i> , with regard to clarifying all parties' subjects for negotiations.	The Mayor's Office	2
<i>Stage III A: Summary of Program Definition</i>				
Local Government	City Council	<p><i>Presentation</i> of the results of stages I - III to the City Council.</p> <p>After debate - political approval of main directions.</p>	The Mayor	3

Table of Action Program and Time Sequence
(Continued)

Who	For Whom	What	Lead	Time Sequence (month)
Company management	Unions	<p><i>Negotiations</i> (preferably first done informally as a definition of bargaining parameters in a document entitled "intent to negotiate") on new system: service contracts, internal issues, possible commercial activities, including:</p> <ul style="list-style-type: none"> Salaries negotiations and hold harmless measures Employment level assurances Equipment improvements Other social benefits Efficiency goals and measures thereof <p>At the end of these negotiations - joint public <i>presentation of results via media.</i></p>	Managers	4
Local Government	General public	Presentation of results of negotiations and <i>final concepts</i> to be prepared for	The Mayor	4

**Table of Action Program and Time Sequence
(Continued)**

Who	For Whom	What	Lead	Time Sequence (month)
Company	Unions, employees	<p>Detailed <i>negotiations</i> on employment and salary restructuring and guarantees:</p> <ul style="list-style-type: none"> Scoping meeting on possible fields of negotiations Business plan and cash flow presentation and discussion Possible City guarantees and market opportunities and threats <p>As mediators the Mayor's Office representatives and City Council members can be involved.</p>	Company Manager	5
ZOM	General public	<p>Marketing information process on new approach to public service, e.g.:</p> <ul style="list-style-type: none"> Customer surveys and focus groups - intent and scheduling of Wider service offered- advertising campaign 	ZOM marketing Officer	5

**Table of Action Program and Time Sequence
(Continued)**

Who	For Whom	What	Lead	Time Sequence (month)
<i>Marketing to Potential Investors and Local Business Interests</i>				
Local government	Targeted investment groups and major manufacturing and service groups	Design charettes of 1) city's overall transportation plan revision, with MZK officials as active participants, and 2) new landfill design schematics, including area within 1 kilometer radius, with ZOM officials as active participants.	Council's planning design	7
Local government	Potential investors	Presentation of documents describing the financial conditions of the two JSCs.	City financial officer	twice a year

ANNEX B

POSITION DESCRIPTION PUBLIC RELATIONS/MARKETING FOR THE MZKSA

GENERAL DESCRIPTION OF THE POSITION

At this time the position has been defined in a preliminary way and a young man has been placed in it for the time being. The team and Jan Friedberg met with the temporary incumbent and went over his background and interests, and gathered from him and the Director a preliminary list of duties for a permanent position, and they are presented below:

- Design and perform market surveys concerning the demand for transport services, analyze the results, and promote transport services within Bielsko-Biala.
- Establish a working relationship with the local business enterprises and neighborhood councils to improve existing services and to consider establishing new routes.
- Monitor services for errors and shortcomings in their design and execution.
- Propose adjustments in bus schedules based on demand, data for this to be gathered from outreach, field investigations, and in-house analyses.
- Measure bus ridership over time, and select bus capacities to match ridership patterns.
- Introduce new programs and services to the community and proactively seek adjustments in services to changes in the physical and social environments.
- Discuss with riders the possible changes in routes, occasional detours, and scheduling.
- Develop a true service culture among employees through field audits and training programs.
- Administer a complaints intake and resolution system for riders. Seek both negative and positive feedback.
- Assume a leadership role in improving the image of the company and its employees as being truly service-oriented.

ANNEX C

POSITION DESCRIPTION QUALITY CONTROL FINANCIAL ANALYST

GENERAL DESCRIPTION OF THE POSITION

This is a mid level position critical to the efficient operation of the city in its oversight of the ZOM and MZK Joint Stock Companies, and as such the employee of the position will in large part be responsible for monitoring the success of the Joint Stock Companies as they operate under the performance measures agreed to with the city under their service contracts. The employee in this position shall operate only under the supervision of the city economy department, and shall not be subject to direct orders from any city or Joint Stock Company official other than his or her direct superior, and only within the scope of duties as described herein.

The principal duties of this position are of a financial nature, with examples given below. As such, the employee of this position is not expected to measure the efficiency of the Joint Stock Companies in terms of service delivery. He or she is expected, however, to act as an effective internal auditor of financial performance standards as defined in service contracts, and from time to time to comment on the continued relevance of those standards. He or she is to suggest revisions where appropriate and in consultation with the head of the city economy department and the Joint Stock Companies, in conformance with best Polish financial practice at those times.

SCOPE OF RESPONSIBILITIES

The employee of the position will exercise considerable judgement in overseeing the financial quality control of the two Joint Stock Companies. Reports made by this position will be in written form and subject to all rules concerning public documents and financial audits. The responsibility level will be high and will the position will be highly visible within city government and with the public.

The employee will devote full time to this set of duties, and will interact on a daily basis with employees of the Joint Stock Companies. Initiative in investigating financial conditions and reporting them in a comprehensive fashion is required. Use of forecasting techniques and the generation of financial trending reports will be necessary.

EXAMPLES OF SPECIFIC DUTIES

- Work closely with Joint Stock Companies to establish reporting instruments and frequency of reports for all financial performance indicators specified in the service agreements between the city and the Joint Stock Companies.
- Gain an understanding of and stay current with service provision issues for both Joint Stock Companies, and work with them to refine existing financial performance indicators and measures.
- Become expert in the overall financial condition of both Joint Stock Companies, and the types of information outside investors will need to analyze investment desirability and risk. Assist Joint Stock Company and other employees, as assigned, to develop the types of reporting techniques and financial documents (similar to simplified bond prospectuses) needed to further the attractiveness of the joint stock companies as investment prospects for public and private sector investors.
- Aid in the development of unit cost measures for Joint Stock Company performance based on the suggested list of performance measurements outlined in the service agreements, such as ,for ZOM, cost per ton of waste removed, cost per entity served, tons of waste removed or number of street kilometers cleaned per day per employee. Verify the amounts of work performed and costs as broken down into constituent elements, and comment upon the budgetary sufficiency of each Joint Stock Company, as presented in its annual reports and draft budget requests to its board of directors. Report these findings through this position's supervisor, as information for the gmina council in its deliberations about financial support to the Joint Stock companies, and where appropriate, requested adjustments in fees or payments by the city.

Similar specific duties for the MZK unit cost measures, among them costs per route, costs per rider, unit costs broken down by labor, capital, fuel, and maintenance.

- Reconcile expenditures against budgeted amounts, in detail. Develop and maintain a system for forecasting over expenditures, on a monthly or more frequent interval, and provide early warning to the supervisor when necessary.
- Other relevant duties as assigned by the supervisor.

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED

- Knowledge of generally accepted Polish cost accounting and fund accounting techniques. Post secondary educational in economics, finance, public administration, or financial analysis preferred.
- Ability to work with computer-generated financial forecasting models and spreadsheet creation is desirable but may be learned on the job as these programs are refined citywide.



- Working knowledge of solid waste collection and disposal, and the fundamental issues in bus transportation planning and operation are essential. Two years of experience in one or both fields is desirable, but may be substituted in part by structured training programs sponsored by the city.
- Ability to administer a system of reconciling actual costs against budgeted amounts.
- Ability to analyze income and expense statements without direct supervision.
- Ability to set up and monitor systems for tracking performance indicators and measures for each Joint Stock Company.
- Ability to work independently and to enter into a consultative process with the joint Stock Companies as to attainment of performance goals.

POSITION REPORTS TO

The Director of the city Economy Department

POSITION SUPERVISES

Clerical staff as assigned from time to time. Position coordinates closely with all field inspectors and the City Control Department.

ANNEX D

POSITION DESCRIPTION QUALITY CONTROL TECHNICAL ANALYST

GENERAL DESCRIPTION OF THE POSITION

This is a mid level position critical to the efficient operation of the city in its oversight of the ZOM and MZK Joint Stock Companies, and as such the employee of the position will in large part be responsible for monitoring the success of the Joint Stock Companies as they operate under the performance measures agreed to with the city under their service contracts. The employee in this position shall operate only under the supervision of the City Transportation Department, and shall not be subject to direct orders from any city or Joint Stock Company official other than his or her direct superior, and only within the scope of duties as described herein.

The principal duties of this position are of a technical nature, with examples given below. As such, the employee of this position is expected to measure the efficiency of the Joint Stock Companies in terms of service delivery and use of equipment and facilities. He or she is expected to act as an effective internal auditor of service performance standards as defined in service contracts, and from time to time to comment on the continued relevance of those standards. He or she is to suggest revisions where appropriate and in consultation with the head of the City Transportation Department and the Joint Stock Companies, in conformance with best Polish practice at those times.

SCOPE OF RESPONSIBILITIES

The employee of the position will exercise considerable judgement in overseeing the service and equipment quality control of the two Joint Stock Companies. Reports made by this position will be in written form and subject to all rules concerning public documents. The responsibility level will be high and the position will be highly visible within city government and with the public.

The employee will devote full time to this set of duties, and will interact as assigned with employees of the Joint Stock Companies. Initiative in investigating service provisions and the status of equipment and facilities, and reporting them in a comprehensive fashion, are required.

EXAMPLES OF SPECIFIC DUTIES

- Work closely with Joint Stock Companies to establish reporting instruments and frequency of reports for all service performance indicators specified in the service agreements between the city and the Joint Stock Companies.
- Gain an understanding of and stay current with service provision issues for both Joint Stock Companies, and work with them to refine existing service performance indicators and measures.
- Become expert in the overall programs and operations of both Joint Stock Companies, and the types of information outside investors will need to analyze investment desirability and risk. Assist Joint Stock Company and other employees, as assigned, to develop the types of reporting techniques and program descriptions needed to further the attractiveness of the joint stock companies as investment prospects for public and private sector investors.
- Aid in the development of service effectiveness measures for each Joint Stock Company based on the suggested lists of performance measurements outlined in the service agreements.
- Become expert in the provision of solid waste and bus transportation programs, and the equipment and maintenance programs of each Joint Stock Company. Be up to date on the types of vehicles, maintenance facilities, and methods of waste collection and disposal necessary to serve the city in a cost effective and competitive manner.

Review in detail all capital spending plans and individual equipment purchase requests for each Joint Stock Company. Offer advice and comments on each type of purchase proposed, and ensure that each Joint Stock Company is aware of the state of the art in equipment, technology, techniques, and personnel requirements for its major programs. Accomplish this by, as assigned, attending trade shows, reading trade journals, and meeting with sales representatives to discuss purchase options.

Also, meet with representatives of other municipal and voivodship governments and ascertain the types of equipment and techniques most likely to provide solid waste and bus transportation services in a cost effective manner. Investigate group purchasing arrangements to effect discounts for quantity purchases.

- Review data produced by the two Joint Stock Companies as to service complaint resolution and suggestions for improved service. Verify that the information is collected systematically and analyzed on a sound basis. Offer advice to Joint Stock Companies on types of equipment or methods likely to insure cost effectiveness in making improvements or adjusting programs.
- Carry out internal inspections and audits of equipment usage, condition, and maintenance practices. Verify service records for vehicles and make written reports as to their sufficiency.
- Other relevant duties as assigned by the supervisor.



KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED

- Working knowledge of solid waste and transportation issues, program design and administration, equipment purchasing and maintenance. Two years in these or related areas preferred, but may in part be substituted by education on the job training.
- Ability to conduct field audits and verify records through examining the condition of vehicles, equipment, and facilities.
- Ability to interpret statistical surveys and analyses presented by Joint Stock Companies.
- Independence of judgement, and ability to work without direct supervision in the field.
- Working knowledge of capital planning principles.
- Educational background in public works, mechanics, facilities management, or a related field preferred.
- Ability to set up and monitor systems for tracking performance indicators and measures for each Joint Stock Company.
- Ability to work independently and to enter into a consultative process with the joint Stock Companies as to attainment of performance goals.

POSITION REPORTS TO

The Director of the City Transportation Department

POSITION SUPERVISES

Clerical staff as assigned from time to time. Position coordinates closely with all field inspectors and the City Control Department.